So You're the New PM?

Tips For a Good Start

Owen Gadeken

That great day has finally come. After working faithfully for months (and perhaps years), you are finally getting your chance to take over as a project or program manager (PM). (*Note: For this article, I will consider the terms project and program equivalent and will use program from here on.*) You may have eagerly sought this opportunity or it may have come quite unexpectedly. In either case, you are about to assume a leadership role for both the program and the people working on it. While there is a chance that you will be starting the program and staffing it from scratch, in this article, I will assume that you are inheriting a program that already exists in some form. This could range from a small team doing early planning to an existing program office with a long history.

The question on your mind (and everyone else's) is what do you do now that you are in charge. To use the classic answer: "It depends." Every program is unique, so what you should do depends on where the program is when you take it over and what it most needs to move forward. So your first job—other than to respond to crises—before you make any decisions is to assess the current state of the program. By the way, the skills you already have or will soon learn in assessing your program are vital to your continued success, and you will apply them frequently as the program moves forward.
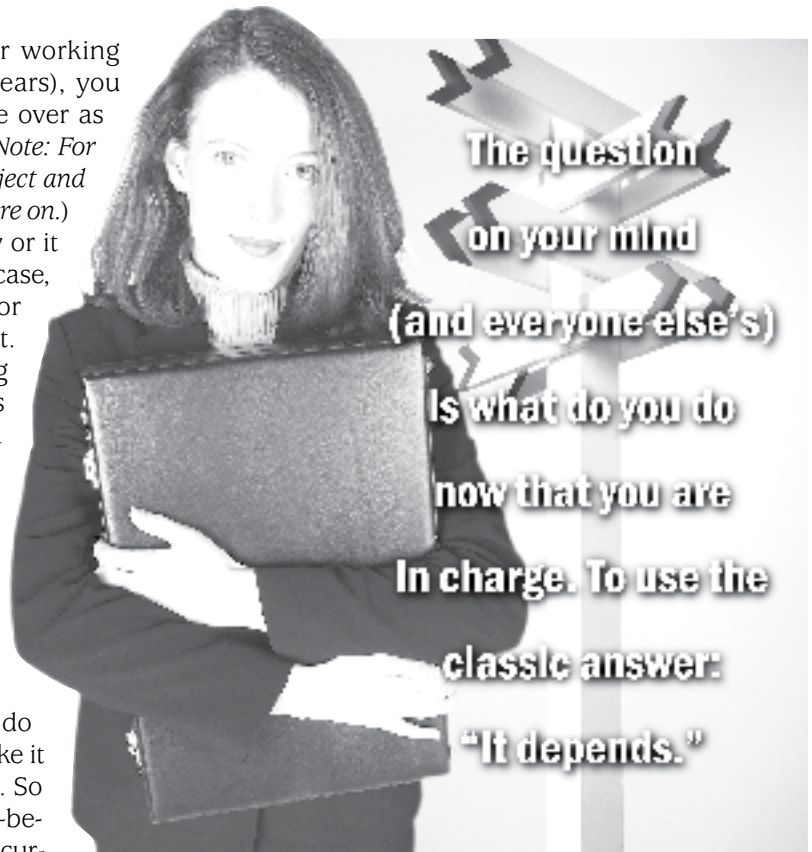
Assessing Your Program

The easiest place to start when assessing your program is with your predecessor, assuming there is one. He or she can provide you not only with current program information, but also with a candid assessment of where the program stands and where it is headed at the moment. They key here is candor. So you will need to make your first value judgment on the quality of the information you receive from the person you will replace.

Reviewing program documentation will give you a good baseline and history of the program you are about to lead. Some of the key documents to review are the requirements (are they current and when were they last vali-

dated?); the program master plan and any recent program reviews (what is the most current official assessment of the program?); program funding (are there any funding or execution shortfalls?); test results (is performance meeting expectations?); and the contracts (key deliverables and earned value metrics?). While program documentation is a rich source for your assessment, it is not the only source and may not even be the best source. In some cases, the documentation may be out of date or out of step with current or emerging program realities.

Making a Good First Impression

Just as important as the documentation are the face-to-face contacts you make with program stakeholders. The fact that you are soon to take over the program should provide you an entrée with these individuals, but it is always good to get the proper approvals (such as from the current PM) in advance. One of the best skills you can bring to this

Gadeken *is a professor at the DAU Fort Belvoir campus. His current interest centers on helping program managers become effective leaders. Gadeken received his doctorate in engineering management from The George Washington University.*

inquiry is an open and honest approach coupled with a desire to hear what all the stakeholders have to say, even if you disagree with their point of view. The key point here is your opportunity to make a solid first impression. This impression should be enhanced with time because each person you talk to will play a role in helping make you and the program successful. In some cases, the relationships you set up will actually be more important than the information you gain from these stakeholders. So to whom do you talk? The list of program stakeholders is potentially endless, and you must look both inside and outside the program office.

Inside the program office, you should try to talk to as many of your future direct reports as you can. You should make it clear to them in advance that they are encouraged to share whatever thoughts and opinions they have about the program. You should also be interested in their ideas on how the program could be improved. You should make it clear that whatever they say will be held in confidence if they so request. Again, your secondary goal here is for each direct report to come away with a good impression of you as someone he or she can work for and work with once you take over the program.

Moving outside the program office, you certainly need to touch base with the requirements or user community. There will normally be a user point of contact for your program, but you may not want to stop there. If given the opportunity, you should consider visiting operational units in the field who are or will be using your system. Service and the Office of the Secretary of Defense headquarters action officers are next on your list. Building solid relationships with them is a must if your program is to keep its funding stream and pass milestone reviews. Meeting the industry management team should also be high on your list. Don't be surprised if they seek you out first. This includes your contractor PM, some of his or her direct reports, and other key subcontractors and support contractors. You may be surprised at the sheer number of different contractors who play important roles on your program.

By now you may be asking, "What about meeting with my new boss?" Yes, that's always important, and you have probably had at least one meeting already. But I recommend that you deliberately put off any follow-on meetings until you are able to gather enough information to make at least a preliminary assessment of your program; otherwise, you may find yourself making promises or commitments you can't keep. Scheduling a later meeting also gives you the chance to show your new boss that you are now up to speed, thereby gaining his or her confidence and support for your first actions.

The goal of your information review and face-to-face meetings is to confirm your current assessment of the program you are about to inherit. In the best-case sce-

nario, you may find that you have inherited a well-running program and need only to sustain and perhaps build on this success. In most cases, though, you will find that your program is relatively sound but requires some changes to get back on track or prevent future problems. In the worst case, you may find that your program is in more serious trouble and requires major transformation to keep it from falling apart. Your assessment of where the program stands will dictate the resulting leadership style you must employ. In a nutshell, this is the situational leadership approach. If you have done your homework well, your leadership style will be just what the program needs. If not, you could actually make things worse or create new issues that you or your replacement must address.

Three Core Actions to Take

While I have stressed that your actions as the new PM are highly dependent on your assessment of the program, there are a few core actions that every new PM must carry out regardless of the circumstances. Assuming you have done your assessment and made some conclusions about the current state of your program, your first actions should address the three themes described below.

Direction

Most programs are awash in documents providing direction. They could include a vision statement, that all-inclusive and cleverly worded statement found at the front of program briefings, reports, and even framed and hanging on the walls around the program office; a mission statement giving promises of great things you will do for the warfighter; a program charter; user requirements; policy directives; milestone and program review memoranda; and taskers from almost anyone. The problem soon becomes which of these sets of overlapping documents really drive the behavior of people who work on the program. You may be shocked to find that your people are working on many different and conflicting priorities.

Your task, should you choose to accept it (and you'd better if you are the new PM!), is to sort through the complexities and ambiguities of the present situation and provide clear direction for your program office and outside stakeholders. The objective here is clarity. Everyone should know and be able to restate in some form what the program priorities are as well as what specific part they must play in achieving those priorities.

As an example, consider this vision statement that I have adapted from a real one used by an experienced Department of Defense program manager: "To produce and field by (insert month and year) a/an (insert name of your system) providing revolutionary combat capability with an average production price of less than (insert unit cost) resulting from a successful government/prime contractor/subcontractor teaming relationship—a relationship where the warfighter gets a system that will maintain

Do you develop and implement PBL strategies?

Then you *really* need to know about DAU's PBL Toolkit.

The Performance-Based Logistics Toolkit is a unique Web-based resource, hosted by the Defense Acquisition University, that provides PMs and logistics managers a step-by-step process and readily available resources to support them in designing and implementing PBL strategies.

The user-friendly online PBL Toolkit is aligned with current DoD policy and is available 24/7 to provide—

- A clear definition and explanation of each PBL design, development, and implementation process step
- The expected output of each process step
- Access to relevant references, tools, policy/guidance, learning materials, templates, and examples to support each step of the process.

The PBL Toolkit is an interactive tool that allows you to—

- Contribute knowledge objects
- Initiate and participate in discussion threads
- Ask questions and obtain help
- Network with members of the AT&L community and learn from their experiences.

To guide you through the development, implementation, and management of performance-based logistics strategies—count on the PBL Toolkit from DAU.

You'll find it at < **https://acc.dau.mil/pbltoolkit** > .

Your task, should you choose to accept it (and you'd better if you are the new PM!), is to sort through the complexities and ambiguities of the present situation and provide clear direction for your program office and outside stakeholders.

superb performance with a low cost of ownership over the life of the program, the prime contractor and their suppliers get a reasonable profit, and the acquisition community gets a model for acquisition reform that others will emulate." Note the inclusion of specific schedule and cost goals along with more general stakeholder objectives. Also note that this or any other vision will likely not drive much behavior change unless the PM makes it a part of his or her day-to-day priorities and walks the talk.

Direction is not effective unless it is communicated, and this means frequently and through different media. Writing down direction and priorities and sending them out is only the start. Nothing can replace your personal touch in communicating this important information, since you are now the leader and visible spokesperson for the program. Years of communication research have taught us that style is actually more important than substance in effective communication. Your style in communicating helps you to share the clarity of your vision as well as your commitment and passion to achieve it. This is the essence of

leadership as well as successful program management: setting a clear direction, getting people to follow you, and achieving the desired outcomes.

Alignment

Now that you have reached some conclusion about the direction and priorities for your program, you need to figure out how to get everyone working toward this same set of priorities. After all, you don't expect to do *all* the hard work on this program. That's why you have a program office. So you must next examine the current degree of alignment across the program office and stakeholder community based on your proposed direction and set of priorities. Your conclusions about alignment will come primarily from the information gathering and personal interviews done during your transition. This assessment will help you formulate a plan to achieve alignment within your team and among your external stakeholders.

But alignment is a personal decision. It cannot be directed as a task or deliverable; it must be built from the ground up, and the building blocks of alignment are relationship development and trust. Within the program office, you have directive authority, but you still need to get team members to buy in to your direction and priorities. This may be difficult if it represents a change from previous priorities, and it is complicated by part-time or matrix employees who get priorities from their parent organizations. Some team members may also have hidden agendas (such as protecting their parent organization or getting promoted).

But internal program office alignment is critical to program success. You *must* get the full support of your direct reports if you are to rely on them to lead in their areas of expertise. It takes only one loose cannon among your direct reports to throw the team out of alignment. In fact, you should never allow a personnel problem of any sort to persist because it can have a devastating effect on team morale. It is far better to have a vacant position on your team than to hang on to a problem employee. That even includes a team member who is competent but doesn't support the current program direction. Aligning the team is your responsibility, and it will likely involve moving team members to different roles or, in some cases, off the team.

Alignment of the team is only the beginning. The real challenge for you as the new PM is aligning the external stakeholders. Here, you have no direct authority and must rely totally on your relationship-development and influence skills. Since that involves considerable time and energy, you must first determine where to concentrate your effort. Which few stakeholders are the real keys to your program's future success? The answer may surprise you. External alignment eventually translates into a series of individual relationships, each requiring a different ap-

proach on your part. Relationships are based on mutual give and take. What do you need to give stakeholders to secure their support for your program? In some cases, it may just be information, while in others, it may involve much more time and attention to detail. Your success as a new PM will be highly correlated to your ability to cultivate and retain a critical mass of external stakeholders.

Credibility

This may seem like a strange requirement of a new PM, but it is the best word I can offer to highlight the character dimension of PM success. In fact, the two previous themes of providing direction and gaining alignment are absolutely dependent on your personal credibility. Credibility literally means being believable, reliable, and worthy of confidence.

Providing direction depends heavily on communication, and your success in communicating is directly linked to your credibility. Gaining alignment based on relationships and influence is, again, wholly determined by your credibility. You bring your credibility with you based on past events, but you must work to build and maintain this credibility through your day-to-day actions. And it takes only one slip, questionable action, or poor decision to erode your credibility and potentially damage your program.

Program managers seldom have enough people, resources, or time for the challenging jobs they are given. With skillful use of their credibility along with their development of relationships and ability to influence the right people, PMs can grow their initial resource base by continually adding outside resources and support. Credibility thus becomes the force multiplier that allows PMs to expand their power base into executable and achievable plans for their programs.

I would like to share the approach offered by another senior DoD program manager who has taken over and successfully led multiple programs: "When I go into a program, I try to get to know it well—know the people, know the data very quickly, and I can usually do that in a few weeks. Then I try to structure vision and goals and a set of the right metrics so that I'll know quickly if anything has gone awry in the program. Then I try to assign directors accountability for achieving those goals. … I spend my time investing my personality and my vision and philosophy with groups of people and one on one."

There is great power and leverage for new program managers in establishing strategic direction, gaining alignment, and building credibility. After all, you only get one chance to make a good first start. The rest is execution.